

Biggest gainers

\$1B+ fee-only RIAs ranked by year-over-year growth in total assets



Rank 2016	Firm	Phone/website	% change	2015 Total		Discretionary		Nondiscretionary		Employees
				assets (\$M)	accounts	assets (\$M)	accounts	assets (\$M)	accounts	
1	Sawtooth Solutions 3500 American Boulevard West, Suite 150 Minneapolis, MN 55431	952-831-0039 sawtootham.com	546.3%	\$2,776.6	9,771	\$2,776.6	9,771	\$0.0	0	16
2	Wealthplan Advisors 7272 E. Indian School Rd., Suite 103 Scottsdale, AZ 85251	480-505-0234 wealthplanadvisor.com	404.2%	\$1,124.5	922	\$206.8	810	\$917.7	112	17
3	Columbia Pacific Wealth Management 1910 Fairview Ave E, Suite 200 Seattle, WA 98102-3620	206-257-3577 columbiapacificwm.com	269.6%	\$2,020.2	595	\$915.0	154	\$1,105.2	441	20
4	Rocky Mountain Advisers 2344 Spruce Street, Suite A Boulder, CO 80302	303-444-5483 boulderfunds.net	191.2%	\$1,126.0	166	\$1,126.0	166	\$0.0	0	11
5	The Mosaic Financial Group 330 North Wabash, Suite 1650 Chicago, IL 60611	312-255-5490 themosaicgrouppllc.com	116.7%	\$1,082.5	560	\$735.9	172	\$346.6	388	28
6	Silvercrest Asset Management Group 1330 Avenue of the Americas, 38th Floor New York, NY 10019-5400	212-649-0600 silvercrestgroup.com	91.5%	\$31,199.2	1,068	\$12,062.9	1,039	\$19,136.2	29	117
7	True North Management Group 10 Bank Street, 12th Floor White Plains, NY 10606	914-304-8760 tninvestors.com	78.7%	\$1,258.4	8	\$1,258.4	8	\$0.0	0	20
8	Lake Street Advisors 25 Chestnut Street, Suite 200 North Portsmouth, NH 03801	603-610-4100 lakestreetadvisors.com	75.9%	\$1,817.5	1,079	\$565.6	385	\$1,251.9	694	31
9	Personal Capital Advisors Corp. 500 Howard Street, Suite 400 San Francisco, CA 94105	415-800-5922 personalcapital.com	70.5%	\$2,128.5	16,906	\$2,128.5	16,906	\$0.0	0	122
10	Beacon Pointe Wealth Advisors 24 Corporate Plaza Drive, Suite 150 Newport Beach, CA 92660	949-718-1600 bpwealthadvisors.com	60.9%	\$1,414.4	4,909	\$1,408.5	4,895	\$5.9	14	40
11	Parallel Advisors 150 Spear Street, Suite 950 San Francisco, CA 94105	866-627-6984 paralleladvisors.com	45.0%	\$1,037.2	4,214	\$1,030.6	4,202	\$6.5	12	31
12	Aperio Group Three Harbor Drive, Suite 315 Sausalito, CA 94965	415-339-4300 aperiogroup.com	31.8%	\$13,243.1	2,512	\$13,243.1	2,512	\$0.0	0	50
13	Colony Family Offices 6805 Morrison Boulevard, Suite 310 Charlotte, NC 28211	704-285-7300 colonyfamilyoffices.com	28.2%	\$1,105.0	322	\$1,075.0	302	\$30.0	20	9
14	WE Family Offices 701 Brickell Avenue, Suite 2100 Miami, FL 33131	305-825-2225 wefamilyoffices.com	27.9%	\$4,237.3	70	\$0.0	0	\$4,237.3	70	43
15	The Pacific Financial Group Inc. 777 108th Avenue NE, Suite 2100 Bellevue, WA 98004	425 451-7722 tpfg.com	26.3%	\$1,420.4	11,396	\$1,366.5	11,221	\$53.9	175	39
16	Scharf Investments 5619 Scotts Valley Drive, Suite 140 Scotts Valley, CA 95066-3453	831-429-6513 scharfinvestments.com	26.3%	\$5,118.0	2,640	\$5,118.0	2,640	\$0.0	0	21
17	Twin Focus Capital Partners 75 Park Plaza, Second Floor Boston, MA 2116	617-720-4500 twinfocuscapital.com	25.7%	\$1,741.9	82	\$1,583.3	80	\$158.6	2	20
18	LBI Wealth Management 177 East Saddle River Drive #413 Saddle River, NJ 07458	201-638-5256	24.2%	\$1,709.8	200	\$1,709.8	200	\$0.0	0	3
19	Gupta Wealth Management 12760 High Bluff Drive, Suite 120 San Diego, CA 92130	858-764-7120 guptawealthmanagement.com	22.7%	\$1,058.7	1,521	\$967.0	1,488	\$91.8	33	18
20	Mill Creek Capital Advisors 161 Washington Street, Suite 1500 Conshohocken, PA 19428	610-941-7700 millcreekcap.com	22.6%	\$4,706.1	307	\$4,160.1	298	\$546.0	9	25
21	BBR Partners Two Grand Central Tower, 140 E. 45th St., 26th Fl New York, NY 10017	212-313-9870 bbrpartners.com	22.2%	\$10,858.4	2,552	\$9,038.2	2,384	\$1,820.2	168	95
22	Frontier Wealth Management 4435 Main Street, Suite 1100 Kansas City, MO 64111	816-753-5100 frontierwealth.com	21.0%	\$1,460.9	4,928	\$1,345.4	4,525	\$115.4	403	45
23	TCI Wealth Advisors Inc. 4011 East Sunrise Drive Tucson, AZ 85718	520-733-1477 tciwealth.com	18.8%	\$1,980.9	6,466	\$1,972.7	6,428	\$8.2	38	51
24	Green Square Capital 6075 Poplar Avenue, Suite 221 Memphis, TN 38119	901-259-6300 greensquarecap.com	18.1%	\$1,841.7	1,855	\$1,387.5	1,571	\$454.3	284	23
25	Carnegie Investment Counsel 30300 Chagrin Boulevard Pepper Pike, OH 44124	216-367-4114 carnegieinvest.com	17.5%	\$1,207.1	2,550	\$1,126.6	2,513	\$80.5	37	21

InvestmentNews qualified 1,719 firms headquartered in the United States based on data reported on Form ADV to the Securities and Exchange Commission as of May 1, 2016. To qualify, firms must have met the following criteria: (1) latest ADV filing date is either on or after Jan. 1, 2016, (2) total AUM is at least \$100M, (3) does not have employees who are registered representatives of a broker-dealer, (4) provided investment advisory services to clients during its most recently completed fiscal year, (5) no more than 50% of amount of regulatory assets under management is attributable to pooled investment vehicles (other than investment companies), (6) no more than 25% of amount of regulatory assets under management is attributable to pension and profit-sharing plans (but not the plan participants), (7) no more than 25% of amount of regulatory assets under management is attributable to corporations or other businesses, (8) does not receive commissions, (9) provides financial planning services, (10) is not actively engaged in business as a broker-dealer (registered or unregistered), (11) is not actively engaged in business as a registered representative of a broker-dealer, (12) has neither a related person who is a broker-dealer/municipal securities dealer/government securities broker or dealer (registered or unregistered) nor one who is an insurance company or agency.

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